

# **ELECTRONIC PROCUREMENT**

## **INFORMATION COLLECTION SYSTEM**



Welcome to a new e\_PICS experience!

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## **INTRODUCTION**

### **GENERAL NOTICE**

**SUBJECT:** Electronic Procurement Information Collection System (e-PICS)

**REF:** USAID General Notice entitled "Acquisition and Assistance  
Document Generation and Data Reporting for FY07" dated  
September 14, 2006

We are pleased to announce the deployment of ePICS!

This web-based reporting tool replaces the data gathering functions previously performed in ProDoc. ProDoc was the Agency's tool for document generation and data gathering and was decommissioned on September 30, 2006. ePICS is an interim tool designed to help us fulfill our reporting requirements, pending full implementation of the new automated systems, Global Acquisition System (GLAS) and Joint Assistance Management System (JAMS). This means that contracting staff, agreement officers, executive officers and others must now enter required data for all awards made this fiscal year that meet the following criteria. For contracts, FPDS-NG requires reporting of all actions where the Total Estimated Cost is expected to exceed the micro-purchase threshold of \$3,000. For assistance instruments, FAADS requires reporting for all actions as there is no minimum threshold. Therefore, all awards and modifications made since October 1, 2006 that meet this stated criteria must now be entered into ePICS and should be completed by July 13, 2007. In addition, in order to comply with the new requirements of the Federal Funding Accountability & Transparency Act of 2006 (FFATA), award information for new awards and modifications must now be entered within 30 days of award.

Note: GLAS users will continue to enter their acquisition award data into GLAS instead of ePICS. Where GLAS is being used, users must still enter assistance awards in ePICS until such time that JAMS is deployed.

### **WASHINGTON**

M/OAA/CAS/SUP will provide roles and access to ePICS to all M/OAA Contract Specialists and Contracting Officers. M/OAA/CAS/SUP will notify M/OAA users once roles and access are set in the system, via e-mail. There is no need to request access. Non-M/OAA personnel responsible for Acquisition & Assistance reporting will also be provided roles and access. Bureau Transition Coordinators (BTCs) should provide a listing of names and offices symbols for all potential users to Judy Britt at [jbritt@usaid.gov](mailto:jbritt@usaid.gov). In addition, to assist Washington users with their entries into ePICS M/OAA/CAS/SUP will prepare NMS reports for each M/OAA Division and bureau for all relevant awards issued between October 1, 2006 and the issuance date of this notice. These reports will be distributed to the Division Chiefs and BTCs for further dissemination.

### **MISSIONS**

With ePICS, Missions are given the authority to designate an on-site Domain Administrator for each Mission location. This will allow each Mission to manage their users. For instance, Missions will create, set roles, and disable their own users. In order to get started, Missions must provide the name of the chosen Domain Administrator and an alternate, to Sebrina Robinson at [srobinson@usaid.gov](mailto:srobinson@usaid.gov).

Please provide these names as soon as possible and no later than June 22. Once the information is received, access will be provided to the Domain Administrators, and they can begin providing access to the rest of the staff at their locations.

#### USER SUPPORT

ePICS is a user-friendly system and we ask that you make use of the attached manuals and data entry tips. The manual has been divided into sections by the type of action being entered for easy of use. The Data Entry Tips is an abridged version of the manuals and intended to help with initial use by providing clarity on basic navigation, terms, and field definitions. These documents will also be posted on the OAA Solution Center website:

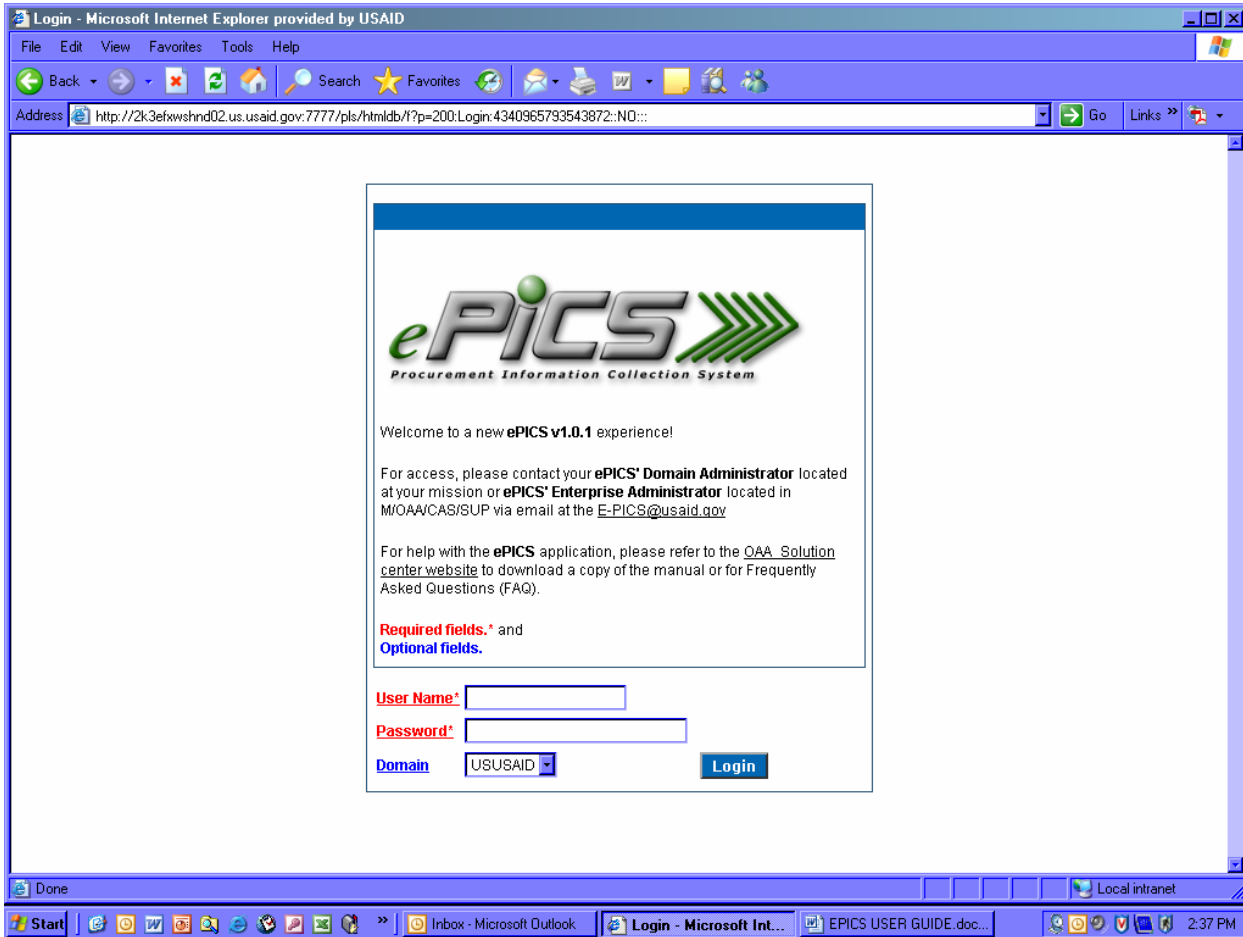
<http://inside.usaid.gov/M/OAA/SolutionsCenter/egov/epics.html>.

As with any new system, we expect many comments, concerns, and suggestions for improvement. A dedicated e-mail box has been set up to accommodate these responses. This e-mail box will also be used to field any requests for help with the application. Please send your messages to the E-PICS@usaid.gov mailbox.

Being a web-based application, ePICS may work better in some locations than others, depending on connectivity strengths and latency issues. Missions of particular concern include: Almaty, Antananarivo, Dar Es Salaam, Dhaka, Dili, Kabul, Kathmandu, Kigali, Lilongwe, and Yerevan. System administrators in these locations should send an e-mail to the E-PICS@usaid.gov mailbox to coordinate additional testing prior to the mission beginning to use ePICS.

ePICS can be found at: <http://epics.us.usaid.gov:7777/pls/htmldb/f?p=777>  
Please bookmark this site.

# I. GETTING STARTED



## A. Logging into the Application

- **User Name:** User Name and password are the same as your network login
- **Domain:** Select your Domain. This is your country location. **For example:** USUSAID = United States. THUSAID = Thailand USAID. Contact your local administrator if not sure which is your PC Domain.

Example: USUSAID\jsmith

\*Domain drop down is optional.

## B. Important System Tips

- Do not use the “X” to end the session. Do not use any of the internet browser tools, such as the “Back” button. Use the “Cancel” button inside the EPICS system.
- If the Phoenix system is down, a message will appear on all screens, regardless of whether your location is connected to Phoenix.
- Move your mouse over field headings to view **Help** screens.
- “%” is used as a wild card in search fields.
- Required fields are shown in red and have an “\*” next to them.
- The ‘Delete’ button only appears on the first tab. If clicked, it will delete the entire record.
- You must click the ‘Save’ button on each screen to save your data. If you move between tabs without clicking the ‘Save’ button, your data will not be saved.
- Categories that have radio buttons suggest that only one option may be chosen. Categories with square boxes suggest that more than one option may be chosen.
- The “Log out” option is located under the user’s name, in the top left-hand corner of the screen.
- Please Note: Data does not copy over from the Base Award to Modifications. Therefore, when entering a Modification, base award information must be re-keyed.

## II. WELCOME/OPENING SCREEN

Welcome Action(S) - Microsoft Internet Explorer provided by USAID

File Edit View Favorites Tools Help

Address <http://2k3ehxwshnd02.us.usaid.gov:7777/pls/htmldb/f?p=200:WELCOME:4340965793543872> Go Links

Hello Robinson, Sebrina  
[Logout](#) [Print](#)

Welcome!! Authorization Access

ePICS v1.0.1  
**Required fields.\* Optional fields.**  
Underline Labels contain Help Screens (except spreadsheet labels).

Create New Actions Search

Display Option: List draft action(s)

Select Modified date from: JAN-01-2007 to: APR-06-2007 and AWARD ID is: ANY

and Validation status is: ANY and Process state is: ANY and Type of Award is: ANY

and Modified by is: % and Created by is: %

1 - 1

Edit Action	Validation status	Type of Award	AWARD ID	Obligation Amount	Created by	Process state
	New	Acquisition	DFD-C-00-07-00006-00		USUSAID\STTASHJIAN	Own by user

In this screen you may **Enter a New Action**, **Search** for a previous action that is not shown in the table at the bottom of the screen, or **View and Export Actions** to an excel spreadsheet for printing.

**Create New Action:** E-PICS is used to capture data for all Acquisition and Assistance Award Types, including IAA and 632A/B. Click this button to begin enter of award information.

**A. Searching** - you can search for actions previously entered in several ways. You can search by:

- Date Range
- Award ID
- Validation Status (Records that have Errors, Warnings, etc.)
- Process State (Records reported/not reported to FPDS-NG)
- Type of Award
- Modified By (Name of person who last modified the record)
- Created By (Name of person that originally entered the record)

The “%” is a wild card and can be used in the fields to broaden the search and assist when all information is not known.

## B. Printing a report

Users have two options for printing records entered into EPICS.

1. You may print each page as you enter the data, by clicking on the “Print” option found under the user’s name in the top left-hand corner of the screen.

Welcome Action(S) - Microsoft Internet Explorer provided by USAID

File Edit View Favorites Tools Help

Address <http://2k3efxwshnd02.us.usaid.gov:7777/pls/htmldb/f?p=200:WELCOME:3504204396392466> Go Links

Hello Robinson, Sebrina  
[Logout](#) [Print](#)

Welcome!! Authorization Access

ePICS v1.0.1  
**Required fields.\* Optional fields.**  
Underline Labels contain Help Screens (except spreadsheet labels).

Create New Actions Search

Display Option: List draft action(s)

Select Modified date from: JAN-01-2007 to: APR-06-2007 and AWARD ID is: ANY

and Validation status is: ANY and Process state is: ANY and Type of Award is: ANY

and Modified by is: % and Created by is: %

1 - 1

Edit Action	Validation status	Type of Award	AWARD ID	Obligation Amount	Created by	Process state
	New	Acquisition	DFD-C-00-07-00006-00		USUSAIDISTTASHJIAN	Own by user

Local intranet

Start | Inbox - Microsoft O... | Welcome Actio... | EPICS USER GUI... | RE: EPICS MANU... | 9:40 AM

2. You may print a summary report of the data (data dump) by exporting it into an Excel Spreadsheet. To do this, you must go to the “Welcome” screen. Choose “View and export actions” from the Display option drop down box. The “Export to Excel” link is now available below the data, at the bottom of the page.



Welcome Action(S) - Microsoft Internet Explorer provided by USAID

File Edit View Favorites Tools Help

Address http://2k3efxwshnd02.us.usaid.gov:7777/pls/htmlb/f?p=200:WELCOME:3504204396392466:SPECIAL%20REQUEST:NO::

Hello **Robinson, Sebrina**  
[Logout](#) [Print](#)

Welcome!! Authorization Access

**ePICS v1.0.1**  
**Required fields.\* Optional fields.**  
Underline Labels contain Help Screens (except spreadsheet labels).

**Create New Actions** **Search**

Display Option: View and export action(s)  
 List draft action(s)  
 View and export action(s)

Select **Modified date from** to APR-06-2007 and **AWARD ID** is ANY  
 and **Validation status** is ANY and **Process state** is ANY and **Type of Award** is ANY  
 and **Modified by** is % and **Created by** is %

1 - 1

AWARD ID	Signed Date	Current Completion Date	Contractor Name from Contract or Vendor Name	Action Obligation Amount	Contracting Officer Name	Negotiator Name	Description	Created Date
DFD-C-00-07-00006-00								APR-05-

[Export to EXcel](#)

Start | Inbox - Microsoft Outlook | Welcome Action(S) - ... | EPICS USER GUIDE.doc... | Local intranet | 9:45 AM

### III. ENTERING A NEW ACTION

Select “Create New Actions” from the home screen.

#### A. INTERAGENCY AGREEMENTS

Types of awards are described in the box to the right. Select “Interagency Agreements” as the type of award and click, “Next” in you are entering data for any of these award types.

Microsoft Internet Explorer provided by USAID

File Edit View Favorites Tools Help

Address [http://2k3efxwshnd02.us.usaid.gov:7777/pls/htmldb/f?p=200:Wizard\\_1\\_of\\_2:3346812579834728::NO::](http://2k3efxwshnd02.us.usaid.gov:7777/pls/htmldb/f?p=200:Wizard_1_of_2:3346812579834728::NO::) Go Links »

Hello **Robinson, Sebrina**  
[Logout](#) [Print](#)

You are using **ePICS v1.0.4** and is **Friday, May eighteenth, 2007 08:29:52 AM (Eastern daylight time)**  
**Required fields.\* Optional fields.**  
**Underline Labels** contain Help Screens (except spreadsheet labels).

**Type of Award** < Back Next >

☐ Acquisition  
☐ Assistance  
☒ Interagency Agreement

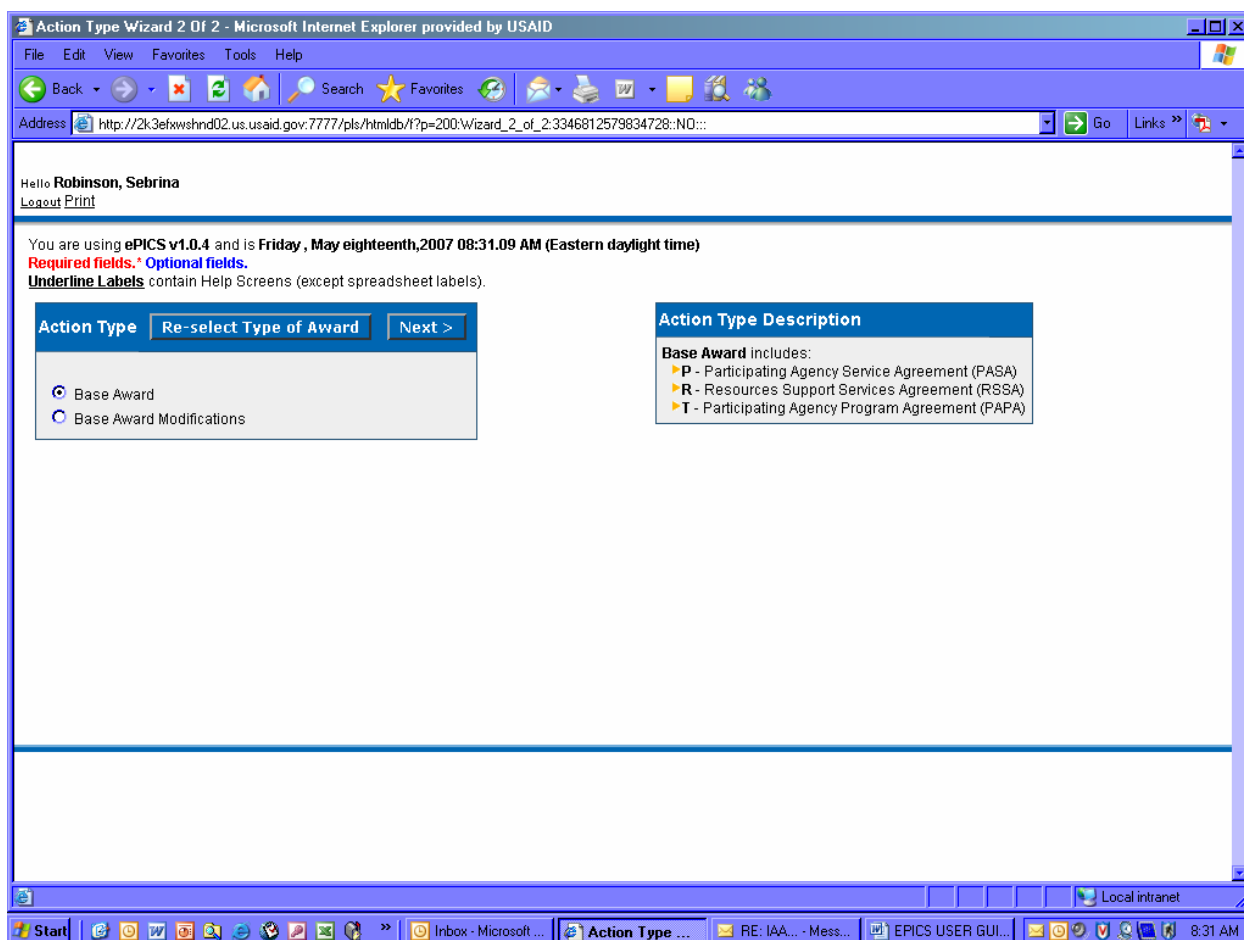
**Type of Award Description**

**Interagency Agreement:**

- ▶ **P** - Participating Agency Service Agreement (PASA)
- ▶ **R** - Resources Support Services Agreement (RSSA)
- ▶ **T** - Participating Agency Program Agreement (PAPA)

Start | Inbox - Microsoft... | Type Procure... | RE: IAA... - Mess... | EPICS USER GUI... | Local intranet | 8:30 AM

Select “Interagency Agreement” as the type of award and click, “Next”.



Select the “Action Type” and then select ‘Next’.

**Note:** The type of award that you select will dictate which screens appear through out the process. If you would like to go back, click “Re-select Type of Award”.

## AWARD INFORMATION TAB

AWARD Information - Microsoft Internet Explorer provided by USAID

File Edit View Favorites Tools Help

Address [http://2k3efxwshnd02.us.usaid.gov:7777/pls/htmldb/f?p=200:AWARD\\_INFORMATION:1110980519158236::NO::](http://2k3efxwshnd02.us.usaid.gov:7777/pls/htmldb/f?p=200:AWARD_INFORMATION:1110980519158236::NO::) Go Links »

Hello Robinson, Sebrina  
Logout Print

AWARD Information Agency Info Vendor Status Vendor Contact Info Location Dates and Dollars Validation

You are using ePICS v1.0.9a and is Friday, June first, 2007 10:03:51 AM (Eastern daylight time)  
Required fields.\* Optional fields.  
Underline Labels contain Help Screens (except spreadsheet labels).

**AWARD Information**

Welcome Delete Save

Base Award ID \*

Action's State

Phoenix Document Type

Phoenix Obligation Document Number

Was this competed?\*

☒ YES  
☐ NO

Interagency Agreement Instrument Type \*

☐ P - Participating Agency Service Agreement (PASA)  
☐ R - Resources Support Services Agreement (RSSA)  
☐ T - Participating Agency Program Agreement (PAPA)

Description of Requirement\*

0 or 4000

Request/MAARD Number

Done Local intranet

Start Inbox - Microsoft O... AWARD Inform... RE: Remaining act... EPICS USER GUI... 10:03 AM

### Base Award No. –

Enter the Award Number.

### Phoenix Document Type-

The Doc Types are codes from Phoenix. Although not required, using this field will make searching for the award number in Phoenix easier. **\*Note:** You must make the correct Doc Type choice in order for Phoenix to find the correct document.

- For USAID/Washington, select codes: 1) Interfaced Acquisitions Delivery Order or 2) Interfaced Acquisitions Purchase Order
- For Missions, select codes: 1) Uni Obligation; 2) Unilateral Obligation Contracts; or 3) Upward Adjustment

### Phoenix Obligation Document Number-

This is the Document number in Phoenix. In Missions, it may be necessary for you to consult with the controller.

### Interagency Agreement Instrument Type –

This field is based on the Interagency Instrument type. For instance, for a Participating Agency Program Agreement, select PAPA.

### Description of Requirement –

Enter a brief description of your award. For instance “USDA shall initiate activities in SE Asia to minimize the transmission of Avian Fluena.” Minimum of 20 characters and maximum of 4000 characters may be entered in this field.

### Request /Maard Number-

Missions Only.

## AGENCY INFORMATION TAB

The screenshot shows a web browser window titled "Agency Info - Microsoft Internet Explorer provided by USAID". The address bar shows a URL from us.usaid.gov. The page displays a user greeting for Robinson, Sebrina and a navigation menu with tabs: AWARD Information, Agency Info (selected), Vendor Status, Vendor Contact Info, Location, Dates and Dollars, and Validation. The main content area is titled "ePICS v1.0.1" and includes instructions about required and optional fields. The "Agency Info" form contains several input fields and buttons:

- Welcome** (button), **Back** (button), **Save** (button)
- Base Award ID** (text field)
- Missing Award ID!!!** (text field)
- Negotiator Email\*** (text field with a "look-up" button icon)
- Negotiator's Organization and Name** (text field)
- Requestor Email\*** (text field with a "look-up" button icon)
- Requestor's Organization and Name** (text field)
- Assistance Contracting Officer Email\*** (text field with a "look-up" button icon)
- Assistance/Contracting Officer's Organization and Name** (text field)
- Cognizant Technical Officer Email\*** (text field with a "look-up" button icon)
- Cognizant Technical Officer's Organization and Name** (text field)
- Areas of Interest** (dropdown menu showing "Not selected yet")

An arrow points to the "look-up" button icon next to the Negotiator Email field.

### Negotiator Email –

Enter the Negotiator’s email address or click on the small “look-up” button next to the field. The “look-up” window will access the directory of “All” the users connected to our intranet. Once you have chosen the person’s name from the list, it will be populated in the appropriate fields.

### Requestor Email –

Enter the Requestor’s email address. (See additional comments under Negotiator Email.)

### Assistance/Contracting Officer Email-

Enter the Assistance or Contracting Officer's email address. (See additional comments under Negotiator Email.)

**Cognizant Technical Officer Email** – Enter the Cognizant Technical Officer's email address. (See additional comments under Negotiator Email.)

**Area of Interest** – Select the area that best describes the purpose of the award. This field is used to assist with reporting.

Agency Info - Microsoft Internet Explorer provided by USAID

Address: http://2k3efwshnd02.us.usaid.gov:7777/pls/htmldb/f?p=200:5:2090093671449231::NO

Hello Robinson, Logout Print

ePICS v1.0.1  
Required fields. \* Optional fields.  
Underline Labels contain Help Screens (except spreadsheet labels).

Active Directory Users

Domain: USUSAID UserPrincipalName: Name: Mail: Office: Department:

row(s) 1 - 12 of more than 1000

	Domain	User_PrincipalName	Name	Mail	Office	Department
	USUSAID	jpoe@us.usaid.gov	Poe, Jean	jpoe@usaid.gov	USAID/AFR/WA	-
	USUSAID	sellis@usaid.gov	Ellis, Shena	sellis@usaid.gov	USAID/MHR/CSP/RS	-
	USUSAID	pdoherly@us.usaid.gov	Doherty, Patrick	pdoherly@usaid.gov	USAID/M/OA/CAS	-
	USUSAID	rgauthier@us.usaid.gov	Gauthier, Ramses	rgauthier@usaid.gov	USAID/AFR/DP	AFR
	USUSAID	rseynkoff@us.usaid.gov	Senyko, Ronald	rseynkoff@usaid.gov	USAID/EGAT/AG	-
	USUSAID	lmcmanus@us.usaid.gov	McManus, Latina	lmcmanus@usaid.gov	USAID/M/IRM/TSI:SOTEC	-
	USUSAID	kruckstuhl@us.usaid.gov	Ruckstuhl, Kristen	kruckstuhl@usaid.gov	USAID/GH/OHA/SPER	GH
	USUSAID	aa-m@usaid.gov	AA/M Communications,	AA/M@usaid.gov	USAID	M.AA (M)
	USUSAID	aafleck@us.usaid.gov	Afleck, Aldona	Aafleck@usaid.gov	USAID/E&E/DGST	-
	USUSAID	aahmed@us.usaid.gov	Ahmed, Abdallah	Aahmed@usaid.gov	USAID/M/CFO/CMP	-
	USUSAID	aahmed-Noor@us.usaid.gov	Ahmed-Noor, Ayan	aahmed-Noor@usaid.gov	USAID/GH/HIDN/MCH	-
	USUSAID	aakins@us.usaid.gov	Akins, Anthony	aakins@usaid.gov	USAID/M/IRM/TSI/SRA	-

javascript:ePicsPopupEmail('P5\_EA\_NEGOTIATOR\_');

Start | Inbox - Microsoft ... | Agency Info - Micr... | EPICS USER GUI... | POPUP Conta... | 11:21 AM

This screen appears when you click the “Look-up” button next to the Negotiator, Requestor, Assistance/Contracting Officer, or Cognizant Technical Officer fields.

You can search by Principal Name, Name, Email, Office, or Department. If you are unsure of spelling, etc., you may also include the wild card (%) in any of the fields. Once you have found the name, click on the ‘paperclip’ next to the person's name and the information will be populated in the appropriate fields.

Names can be sorted by user simply by clicking on the header of the “Name” column.

## VENDOR STATUS TAB

The screenshot shows a web browser window titled "Vendor Status - Microsoft Internet Explorer provided by USAID". The address bar displays a URL from the USAID system. The page header includes a greeting "Hello Robinson, Sebrina" and a "Logout Print" link. A navigation bar contains tabs for "AWARD Information", "Agency Info", "Vendor Status" (which is active), "Vendor Contact Info", "Location", "Dates and Dollars", and "Validation".

The main content area is titled "ePICS v1.0.1" and includes instructions about required and optional fields. A "Vendor Status" section contains a "Welcome" button and "Back" and "Save" buttons. Below this, there are three sections of radio button options:

- Base Award ID**  
**Missing Award ID!!!**  
**Governmental Status**
  - ☐ Government Organization
  - ☐ Non-Government Organization
- Profit Status\***
  - ☐ For-Profit Organization
  - ☐ Nonprofit Organization
- Vendor Origin\***
  - ☐ Non-US Organization/Individual
  - ☒ US Organization/Individual

The Windows taskbar at the bottom shows the Start button, several application icons, and the system clock indicating 1:34 PM.

Make the appropriate selections regarding the Vendor.

The screen will change when you make your selection for **Governmental Status**. Based on which selection you make (Government Organization or Non-Government Organization), the system will provide you with additional options. (See below)

## Government Organization

Vendor Status - Microsoft Internet Explorer provided by USAID

File Edit View Favorites Tools Help

Address [http://2k3efxwshnd02.us.usaid.gov:7777/pls/htmldb/f?p=200:6:2090093671449231::NO::P6\\_EG\\_CD:GO](http://2k3efxwshnd02.us.usaid.gov:7777/pls/htmldb/f?p=200:6:2090093671449231::NO::P6_EG_CD:GO) Go Links

Hello Robinson, Sebrina Logout Print

AWARD Information Agency Info **Vendor Status** Vendor Contact Info Location Set Aside Competition Acquisition Only Contract Info Dates and Dollars Validation

ePICS v1.0.1  
**Required fields.\*** Optional fields.  
**Underline Labels** contain Help Screens (except spreadsheet labels).

**Vendor Status**

Welcome Back Save

**Base Award ID**  
**Missing Award ID!!!**

**Governmental Status**

☒ Government Organization  
☐ Non-Government Organization

**Profit Status\***

☐ For-Profit Organization  
☐ Nonprofit Organization

**Vendor Origin\***

☐ Non-US Organization/Individual  
☒ US Organization/Individual

**Government Type**

☐ Public International Organization  
☐ Non-US Governmental Organization  
☐ US Federal Government  
☐ US State Government  
☐ US County Government  
☐ US City/Township  
☐ US Special District  
☐ US Independent School District  
☐ US State Controlled Institution of Higher Education  
☐ US-Located Tribal Government  
☐ Other US Government Organization

Start | Local intranet | 10:51 AM



## Non-Government Organization

Vendor Status - Microsoft Internet Explorer provided by USAID

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites RSS Feeds

Address http://2k3efxwshnd02.us.usaid.gov:7777/pls/htmldb/f?p=200:6:2090093671449231::NO::P6\_EG\_CD:NGO Go Links »

Hello **Robinson, Sebrina** Logout Print

AWARD Information Agency Info **Vendor Status** Vendor Contact Info Location Set Aside Competition Acquisition Only Contract Info Dates and Dollars Validation

ePICS v1.0.1  
**Required fields.\* Optional fields.**  
Underline Labels contain Help Screens (except spreadsheet labels).

**Vendor Status**

Welcome Back Save

**Base Award ID**  
**Missing Award ID!!!**

**Governmental Status**

☐ Government Organization  
☒ Non-Government Organization

**Business Size Selection \***

☐ Small Business  
☐ Other than Small Business  
☐ Foreign Business

**Other Status**

☐ Higher Educational Institution (University Level)  
☐ Other Educational Institution  
☐ Individual  
☐ Hospital  
☐ Not Applicable

**Profit Status\***

☐ For-Profit Organization  
☐ Nonprofit Organization

**Vendor Origin\***

☐ Non-US Organization/Individual  
☒ US Organization/Individual

Done Local intranet

Start | Inbox - Microsoft Outlook | Vendor Status - Micr... | EPICS USER GUIDE.doc... | 10:51 AM

## VENDOR CONTACT INFORMATION TAB

Vendor Contact Info - Microsoft Internet Explorer provided by USAID

File Edit View Favorites Tools Help

Address <http://2k3efxwshnd02.us.usaid.gov:7777/pls/htmldb/f?p=200:7:3346812579834728::NO> Go Links

Hello Robinson, Sebrina Logout Print

AWARD Information Agency Info Vendor Status **Vendor Contact Info** Location Set Aside Competition Acquisition Only Contract Info Dates and Dollars Validation

You are using ePICS v1.0.4 and is Friday, May eighteenth, 2007 08:44:37 AM (Eastern daylight time)

Required fields.\* Optional fields.

Underline Labels contain Help Screens (except spreadsheet labels).

**Vendor Contact Info**

Welcome Back Save

Base Award ID  
Missing Award ID!!!

Vendor Name from Contract \*

Email Address

Vendor Doing Business As Name

Phone Number

Fax Number

DUNS Number \*

Address Line 1 \*

Address Line 2

Address Line 3

Zip Code \*

City \*

State \*

Country Code \*

### Vendor Name from Contract –

Enter the Vendor Name as it appears on the contract, and all other Vendor information. Look-up buttons are available for some fields.

### DUNS Number –

All vendors doing business with the Federal Government must have a DUNS number. However, in addition to “vendor DUNS numbers” there are also Generic DUNS numbers that can be used under “specific” circumstances. At USAID, these numbers are to be used primarily for PSCs. Please ensure that you do not abuse “Generic DUNS number” usage and only use them in the instances specified. Please refer to AAPD 07-02.

- **123456787 all individuals under US PSCs, FSN PSCs, TCN PSCs or Purchase Orders** will use a generic DUNS and are not required to register with CCR. The Agency has been granted permission temporarily to use a “general” DUNS number for reporting these entities. When issuing an award to an individual please enter/use this number for systems data entry.
- **79-023-8638 Domestic Contractor (Undisclosed)**  
Used to report procurement actions awarded to vendors located in the United States for classified programs (where the action itself is classified) or other programs where identifying

the vendor could cause harm to the mission or the vendor.

- **79-023-8851 Foreign Contractor (Undisclosed)**

Used to report procurement actions awarded to vendors located outside the United States for classified programs (where the action itself is classified) or other programs where identifying the vendor could cause harm to the mission or the vendor.

## **LOCATION TAB**

The screenshot shows a web browser window titled "Location - Microsoft Internet Explorer provided by USAID". The address bar displays a URL from the USAID system. The page header includes a greeting "Hello Robinson, Sebrina" and a navigation menu with tabs: "AWARD Information", "Agency Info", "Vendor Status", "Vendor Contact Info", "Location" (which is active), "Dates and Dollars", and "Validation". Below the header, a message states the user is using ePICS v1.0.9b on Wednesday, June sixth, 2007 at 10:34:57 AM. It also provides instructions on required and optional fields and help screens. The main content area is titled "Location" and contains a "Welcome" message, "Back" and "Save" buttons, and a "Base Award ID" field with a "Missing Award ID!!!" error message. Below this are three input fields: "Place of Performance (Country) \*", "Place of Performance (Zip Code) \*", and "Authorized GEO Code \*", each with a dropdown arrow. The Windows taskbar at the bottom shows the Start button, several open applications including "Inbox - Microsoft...", "Location - Mic...", and "EPICS USER GUI...", and the system clock showing 10:35 AM on 6/6/2007.

### **Place of Manufacture –**

This field is used primarily to satisfy inquiries pertaining to the Buy America Act.

- 1) **US** = Product is manufactured in the U.S. or at least 50% of the cost of components are manufactured in the U.S. or qualifying countries;
- 2) **Foreign** = Manufactured outside of the U.S. or if manufactured in the U.S. at least 50% is manufactured outside of the U.S.;
- 3) **Not Applicable** = Use if Place of Manufacture does not apply such as Services or Construction.

## Country of Origin –

Enter **US** if the product being procured is a domestic end product. If the product is not a domestic end product, enter the **FIPS 10 Country Code** or use the search button on the screen to find the appropriate country Code. This field provides information to support the Buy American Act, Trade Agreement Act, and Small Business Act.

## Authorized GEO Code-

See ADS 310.1a, Source Origin Nationality. This section sets forth the sources for procurement, which are normally authorized for USAID-financed transactions. Each USAID obligating document shall specify a USAID Geographic Code that defines the eligible source for foreign exchange procurement.

## **DATES AND DOLLARS TAB**

The screenshot shows a web browser window titled "Dates And Dollars - Microsoft Internet Explorer provided by USAID". The address bar shows a URL from the USAID system. The page has a navigation bar with tabs: AWARD Information, Agency Info, Vendor Status, Vendor Contact Info, Location, Dates and Dollars (selected), and Validation. The main content area displays a form titled "Dates and Dollars" with buttons for "Welcome", "Back", and "Save and Validate". The form includes a "Base Award ID" field and a "Missing Award ID!!!" message. Below this are several input fields with labels: "Date Signed \*" (with a calendar icon), "Obligation Amount \*" (with a currency icon), "Effective Date \*" (with a calendar icon), "Non-Federal Funding Amount" (with a currency icon), "Current Completion Date \*" (with a calendar icon), and "Total Estimated Cost (TEC) \*" (with a currency icon). The Windows taskbar at the bottom shows the Start button, several application icons, and the system clock at 10:37 AM.

## Date Signed-

The date the Contracting/Agreement Officer signed the award.

## Obligation Amount-

Amount obligated by this transaction.

**Effective Date –**

The starting date for the award's requirements.

**Non-Federal Funding Amount –**

Funding from Non-federal resources that will be used in the award (i.e. contributions).

**Current Completion Date –**

For the base award, report the completion date of the base award plus any options that have been exercised at the time of award. For modifications, report the revised scheduled completion date.

**Total Estimated Cost (TEC) –**

Enter the TEC for the entire award

**NOTE:** Once you have entered all data, you will click **“Save and Validate”**. The system will validate the data that you have entered and present any errors that have been found. (See section on VALIDATING AN ACTION)

## IV. VALIDATING AN ACTION

This screen appears when you click on the Validation tab, the last tab at the top of the screen.

Hello **Robinson, Sebrina**  
Logout Print

**Validation**

Welcome AWARD Information

IDV / IDV Orders ID  
RAN-I-00-04-12345-00

1 - 35

Jump to screen	Severity	REC ID = 1515 AWARD ID = RAN-I-00-04-12345-00	Screen ID
	ERROR	Performance-Based Service Acquisition is a required field.	ACQUISITION_ONLY
	ERROR	Negotiator is a required field.	AGENCY_INFO
	WARNING	Please select the Area of Interest that best describes the purpose of the award.	AGENCY_INFO
	ERROR	Cognizant Technical Officer is a required field.	AGENCY_INFO
	ERROR	Assistance/Contracting Officer is a required field.	AGENCY_INFO
	ERROR	Requestor is a required field.	AGENCY_INFO
	WARNING	Phoenix Document is null.	AWARD_INFORMATION
	ERROR	AWARD ID is duplicated.	AWARD_INFORMATION
	ERROR	Description of Requirement is a required field and must be at least 25 characters long.	AWARD_INFORMATION
	ERROR	Number of Offers is a required field and/or must be numeric.	COMPETITION
	ERROR	Extent Competed is a required field.	COMPETITION
	ERROR	Solicitation Procedures is a required field.	COMPETITION
	ERROR	NAICS Code is a required field.	CONTRACT_INFO

When you click on the symbol in the first column you will be taken to the screen where the error is located.

### VALIDATION COMPLETED- No Errors Found

**ERRORS** -are hard-stops and will not allow the data to be transmitted to FPDS-NG. Corrections must be made before the data will be transmitted. A listing of the error(s) are displayed on the last tab, with links to the screen that contains the error.

**WARNINGS**- are not hard-stops. The system will return a status of “VALIDATE w/Warnings”, and proceed with reporting the action to FPDS-NG.

## V. SEARCHING FOR AN ACTION

Welcome Action(S) - Microsoft Internet Explorer provided by USAID

File Edit View Favorites Tools Help

Address <http://epics.us.usaid.gov:7777/pls/htmldb/f?p=777:WELCOME:1406832216933822> Go Links

Hello Robinson, Sebrina  
[Logout](#) [Print](#)

Welcome! Authorization Access

ePICS v1.0.1  
**Required fields.\* Optional fields.**  
Underline Labels contain Help Screens (except spreadsheet labels).

Create New Actions Search

Display Option: List draft action(s)

Select Modified date from: JAN-01-2007 to: APR-06-2007 and AWARD ID is: ANY

and Validation status is: ANY and Process state is: ANY and Type of Award is: ANY

and Modified by is: % and Created by is: %

1 - 1

Edit Action	Validation status	Type of Award	AWARD ID	Obligation Amount	Created by	Process state
	New	Acquisition	DFD-C-00-07-00006-00		USUSAIDISTTASHJIAN	Own by user

Done

Start | Inbox - Microsoft ... | Mt. Sinai Found ... | EPICS USER GUI... | Welcome Acti... | 11:12 AM

From the Welcome/Opening page you can search for actions previously entered in several ways.

You can search by:

- Date Range
- Award ID
- Validation Status (Records that have Errors, Warnings, etc.)
- Process State (Records reported/not reported to FPDS-NG)
- Type of Award
- Modified By (Name of person who last modified the record)
- Created By (Name of person that originally entered the record)

The “%” is a wild card and can be used in the fields to broaden the search and assist when all information is not known.

## VI. SYSTEM ADMINISTRATION

From the home page, click the “Authorization Access” tab next to the Welcome tab (top right corner of the screen). \* If you do not have “Authorization Access” tab, then you do not have System Administrator access.

Welcome Action(S) - Microsoft Internet Explorer provided by USAID

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites

Address <http://2k3efxwshnd02.us.usaid.gov:7777/pls/htmldb/f?p=200:1:2090093671449231::NO> Go Links

Hello Robinson, Sebrina  
[Logout](#) [Print](#)

Welcome!! Authorization Access

ePICS v1.0.1  
**Required fields.** \* Optional fields.  
Underline Labels contain Help Screens (except spreadsheet labels).

Create New Actions Search

Display Option: List draft action(s)

Select Modified date from: JAN-01-2007 to: APR-06-2007 and AWARD ID is: ANY

and Validation status is: ANY and Process state is: ANY and Type of Award is: ANY

and Modified by is: % and Created by is: %

1 - 1

Edit Action	Validation status	Type of Award	AWARD ID	Obligation Amount	Created by	Process state
	New	Acquisition	DFD-C-00-07-00006-00		USUSAIDISTTASHJIAN	Own by user

Local intranet

Start | Inbox - Microsoft... | Welcome Acti... | EPICS USER GUI... | EPICS USER GUI... | 12:12 PM



## A. Adding A User To The System

Update APPLICATION\_AUTHORIZATION - Microsoft Internet Explorer provided by USAID

File Edit View Favorites Tools Help

Address <http://2k3efxwshnd02.us.usaid.gov:7777/pls/htmldb/f?p=200:215:2090093671449231::NO> Go Links

Hello **Robinson, Sebrina**  
[Logout](#) [Print](#)

Welcome!! Authorization Access

ePICS v1.0.1  
**Required fields.\* Optional fields.**  
**Underline Labels** contain Help Screens (except spreadsheet labels).

List Authorized Users

Welcome Delete Save Changes Save new row

Domain\* Login ID\* Use this value to search and search using this attribute

USUSA ANY Name

row(s) 1 - 5 of 12

<input type="checkbox"/>	Name	User_PrincipalName	Telephone_Number	Office	Login_ID	Authorization_Type
<input type="checkbox"/>	Doherty, Patrick	pdoherty@us.usaid.gov	202-712-0909	USAID/M/OAA/CAS	pdoherty	USER
<input type="checkbox"/>	Hupp, Kim	khupp@us.usaid.gov	202-712-4148	USAID/M/OAA/E	khupp	USER
<input type="checkbox"/>	Allen, Vanessa	vallen@us.usaid.gov	202-712-1456	USAID/M/OAA/CAS	vallen	DOMAIN
<input type="checkbox"/>	Elvir, Gabriel	gelvir@us.usaid.gov	202-712-0466	USAID/M/OAA/CAS	gelvir	ENTERPRISE
<input type="checkbox"/>	Britt, Judy	jbritt@us.usaid.gov	202-712-0397	USAID/M/OAA/CAS	jbritt	ENTERPRISE

Export to EXcel

Local intranet

Start | Inbox - Microsoft ... | Update APPLI... | EPICS USER GUI... | EPICS USER GUI... | 12:14 PM

**Step 1:** From the drop down menu, choose the domain location of the person you are granting access to.

**Step 2:** Either type in the person's Login ID (usually their first initial and last name). If you are unsure of their login id, click the look-up button next to the Login ID field.

Update APPLICATION\_AUTHORIZATION - Microsoft Internet Explorer provided by USAID

File Edit View Favorites Tools Help

Address http://2k3efxwshnd02.us.usaid.gov:7777/pls/htmldb/f?p=200:215:923098836621716::NO::&success\_msg=1%20row(s)%20deleted.%2FF7144F190A2416F7356E9

Hello Robinson  
Logout Print

e\_PICS V1.0.0  
Required field  
Underline lab

POPUP Authorized Login ID - Microsoft Internet Explorer provided by USAID

e\_PICS V1.0.0 as Mar 30, 2007 10:00 AM  
Required fields are shown in this way.\* Optional fields are shown in this way.  
Underline labels mean Help Screen has been provided, except when are spreadsheet's labels

Active Directory Users

List Auth

Cancel

Domain\*  
USUSAID

row(s) 6

	Domain	Login ID	Name	Mail	Office	Department
<input type="checkbox"/>	USUSAID	jpoe	Poe, Jean	jpoe@usaid.gov	USAID/AFRANA	-
<input type="checkbox"/>	USUSAID	sellis	Ellis, Shena	sellis@usaid.gov	USAID/M/HR/POD/CS	-
<input type="checkbox"/>	USUSAID	pdoherly	Doherty, Patrick	pdoherly@usaid.gov	USAID/M/OAA/CAS	-
<input type="checkbox"/>	USUSAID	rgauthier	Gauthier, Ramses	rgauthier@usaid.gov	USAID/AFR/DP	AFR
<input type="checkbox"/>	USUSAID	rsenykoff	Senykoff, Ronald	rsenykoff@usaid.gov	USAID/EGAT/AG/	-
<input type="checkbox"/>	USUSAID	chardavis	Davis, Charles	chardavis@usaid.gov	USAID/M/IRM/TSI:SOTEC	-
<input type="checkbox"/>	USUSAID	lmcmanus	McManus, Latina	lmcmanus@usaid.gov	USAID/M/IRM/TSI:SOTEC	-
<input type="checkbox"/>	USUSAID	kruckstuhl	Ruckstuhl, Kristen	kruckstuhl@usaid.gov	USAID/GH/OHA/SPER	GH
<input type="checkbox"/>	USUSAID	aa-m	AAVM Communications,	AAVM@usaid.gov	USAID	M.AA (M)
<input type="checkbox"/>	USUSAID	aafleck	Affleck, Aldona	AAffleck@usaid.gov	USAID/E&E/DGST	-
<input type="checkbox"/>	USUSAID	aahmed	Ahmed, Abdallah	AAhmed@usaid.gov	USAID/M/CFO/CMP	-
<input type="checkbox"/>	USUSAID	aahmed-Noor	Ahmed-Noor, Ayan	aahmed-Noor@usaid.gov	USAID/GH/HIDN/MCH	-

row(s) 1 - 12 of more than 1000

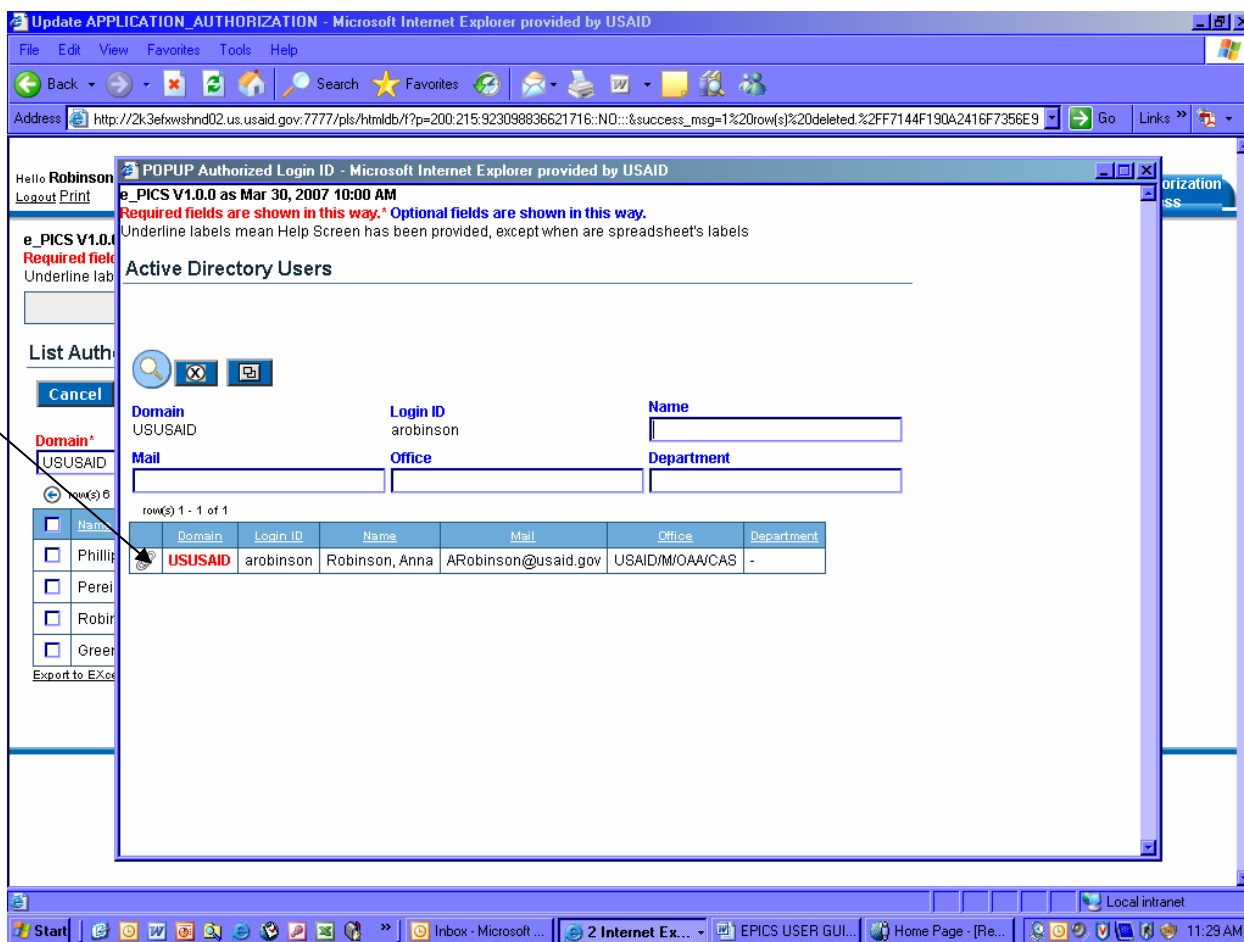
Export to EXCEL

Local intranet

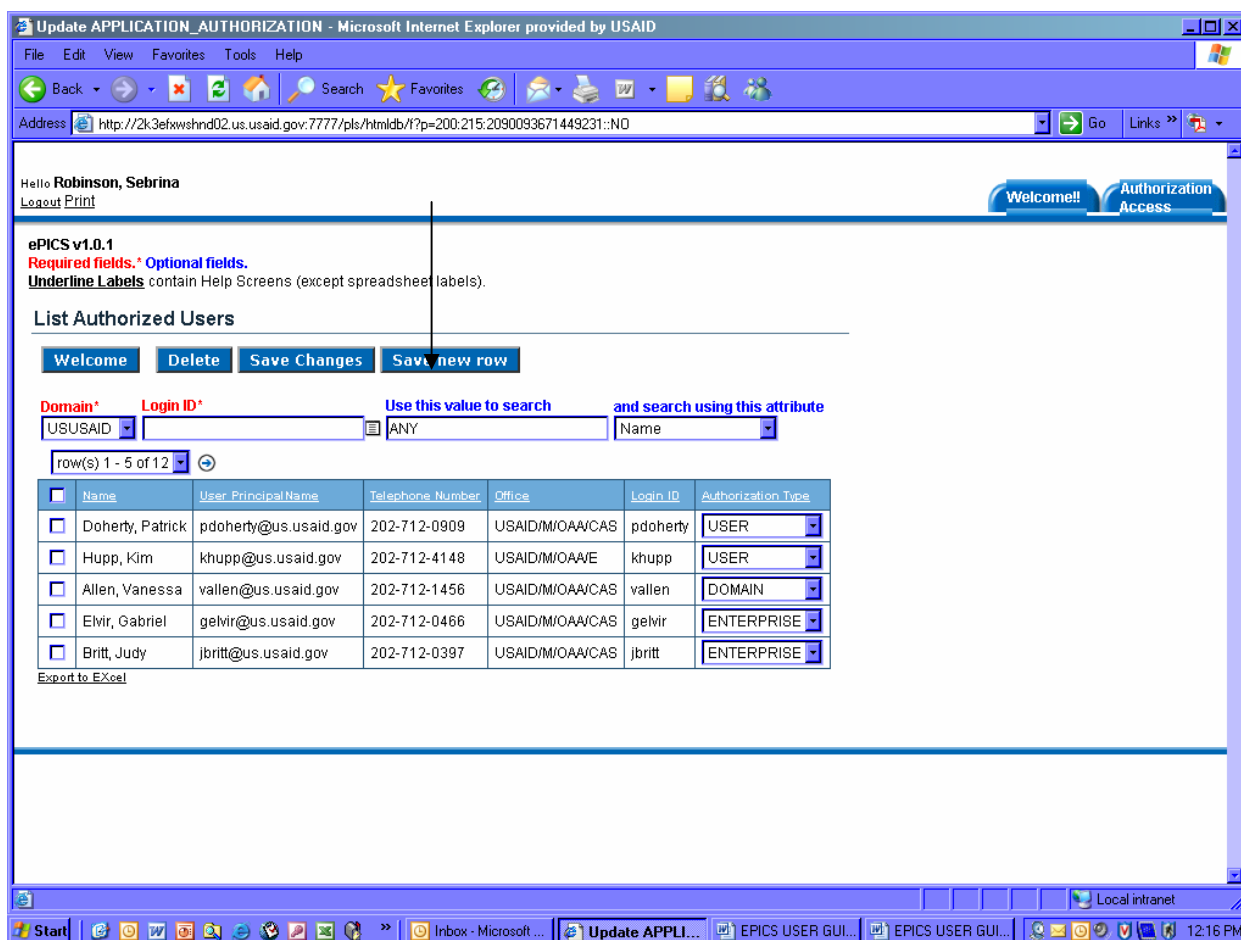
Start | Inbox - Micro... | Update APP... | POPUP A... | EPICS USE... | Home Page ... | 11:20 AM

\* If you use the look-up button, the screen above will appear and you will have more search options to help locate the person's name. Use the fields provided to type in known information. You may use the "%" as a wild card for any field. Then click the "search" button (the button that resembles a magnifying glass).

Names can be sorted by user simply by clicking on the header of the "Name" column.



**Step 3:** Once you locate the person's name in the list, click the paper clip next to their name, and it will populate the person's name in the original screen.



**Step 4:** The person's name is now in the Login ID field. Click the "Add Row" button, to add the person to the list of people who already have access to the system.

The person's name is now added to the list.

## B. Granting Access To A User

Update APPLICATION\_AUTHORIZATION - Microsoft Internet Explorer provided by USAID

File Edit View Favorites Tools Help

Address <http://2k3efxwshnd02.us.usaid.gov:7777/pls/htmldb/f?p=200:215:2090093671449231::NO> Go Links

Hello **Robinson, Sebrina**  
[Logout](#) [Print](#)

Welcome!! [Authorization Access](#)

ePICS v1.0.1  
**Required fields:** \* **Optional fields:**  
**Underline Labels** contain Help Screens (except spreadsheet labels).

List Authorized Users

Welcome Delete Save Changes Save new row

Domain\* Login ID\* Use this value to search and search using this attribute  
USUSAID ANY Name

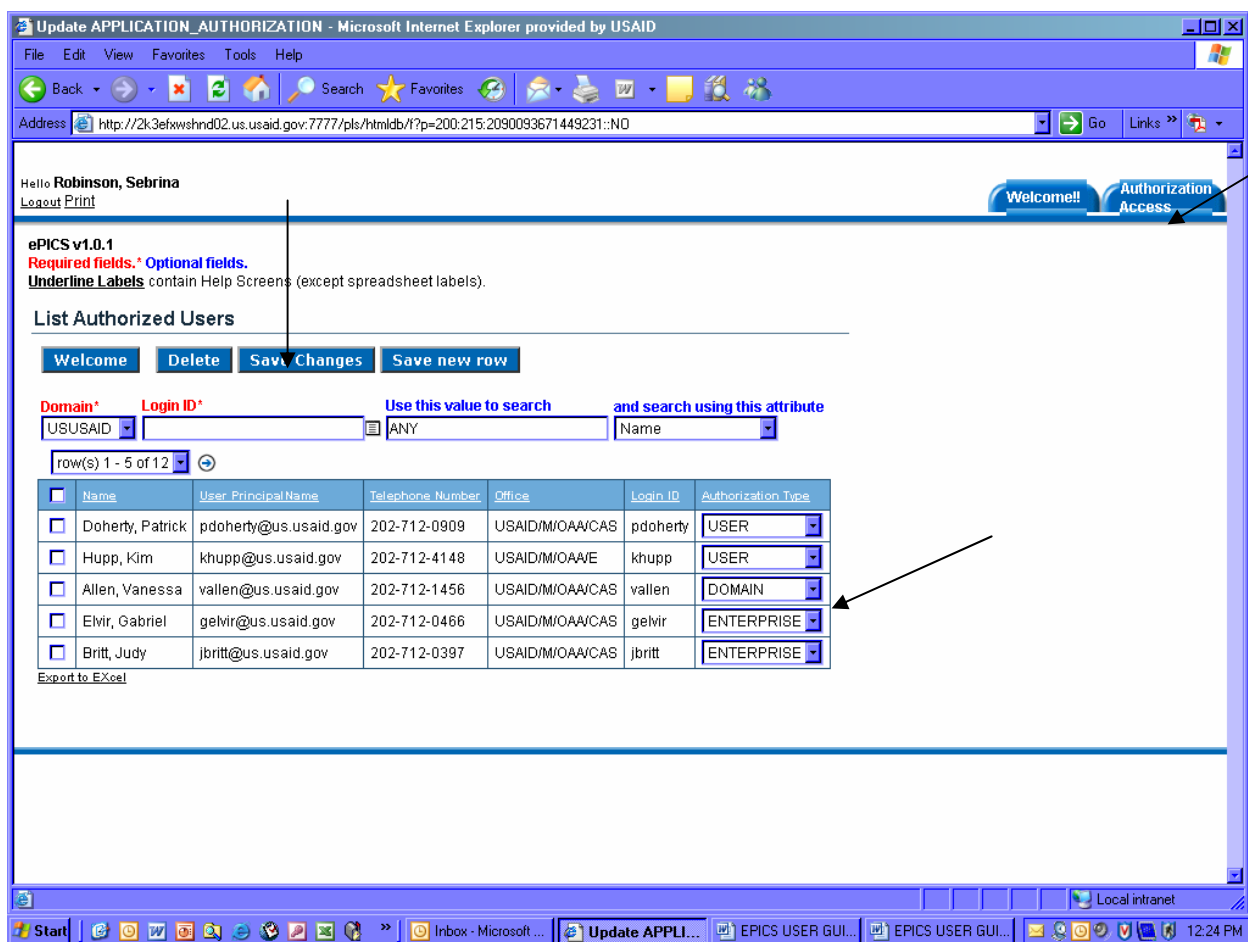
row(s) 1 - 5 of 12

<input type="checkbox"/>	Name	User_PrincipalName	Telephone Number	Office	Login ID	Authorization Type
<input type="checkbox"/>	Doherty, Patrick	pdoherty@us.usaid.gov	202-712-0909	USAID/M/OAA/CAS	pdoherty	USER
<input type="checkbox"/>	Hupp, Kim	khupp@us.usaid.gov	202-712-4148	USAID/M/OAA/E	khupp	USER
<input type="checkbox"/>	Allen, Vanessa	vallen@us.usaid.gov	202-712-1456	USAID/M/OAA/CAS	vallen	DOMAIN
<input type="checkbox"/>	Elvir, Gabriel	gelvir@us.usaid.gov	202-712-0466	USAID/M/OAA/CAS	gelvir	ENTERPRISE
<input type="checkbox"/>	Britt, Judy	jbritt@us.usaid.gov	202-712-0397	USAID/M/OAA/CAS	jbritt	ENTERPRISE

[Export to Excel](#)

**There are three authorization levels in EPICS:**

- 1. Enterprise** - At the **Enterprise** authorization level, you are able to view all actions within USAID. As a System Administrator at this level, you are able to grant authorization to a user for this level and either of the other levels.
- 2. Domain** - At the **Domain** authorization level, you are able to view all actions for your location (i.e. Washington or Mission location). As a System Administrator at this level, you are able to grant authorization to a user for this level or the Group level.
- 3. Group** - At the **Group** authorization level, you are able to view all action for your group (i.e. GH, DCHA, GRO, etc.). This is the level of authorization that most users will have.

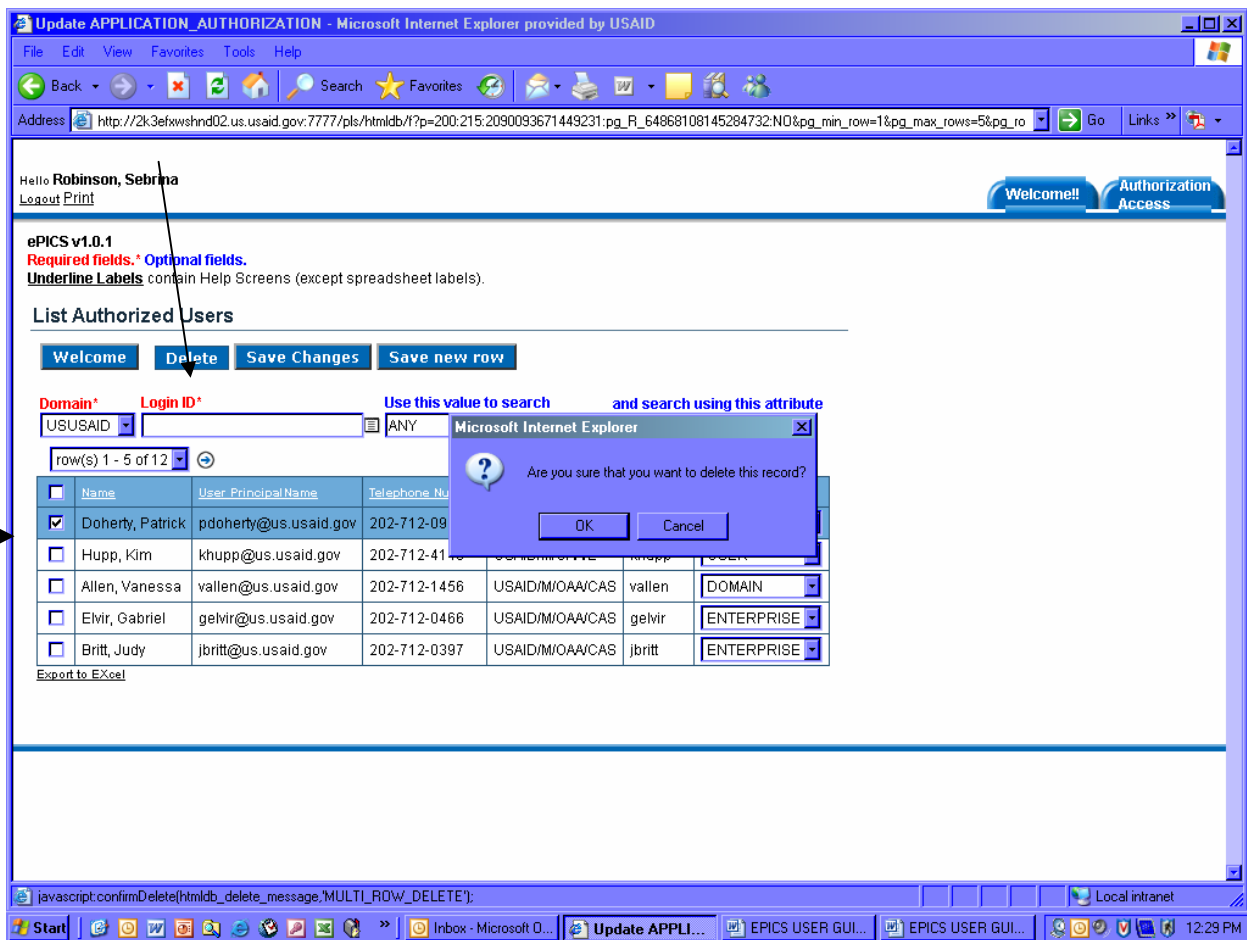


**Step 1:** Click on the “Authorization Access” tab from the home page.

**Step 2:** The system automatically defaults to the “User” authorization level. To change this, click on the drop down menu next to the person’s name and choose the appropriate level.

**Step 3:** Click the “Save Changes” button to save the change.

## C. Deleting a User



**Step 1:** From the home page, click on the “Authorization Access” tab.

**Step 2:** Check the box next to the user’s name.

**Step 3:** Click the “Delete” button. The system will ask you to confirm that you would like to delete the user. Click “Yes” or “Cancel”.

## VII. INDEX

### A. CFDA Table

- **Catalog for Federal Domestic Assistance (CFDA)** –This was established by the Federal Program Information Act (31 U.S.C. 6104) and OMB Circular A-89. It catalogs all federal domestic assistance programs, including programs that finance grants or cooperative agreements to U.S. recipients for activities abroad.

### **United States Agency for International Development Assistance Programs**

<b><u>PROGRAM TITLE</u></b>	<b><u>CFDA #</u></b>
USAID Foreign Assistance for Programs Overseas	98.001
Cooperative Development Program (CDP)	98.002
Ocean Freight Reimbursement Program (OFR)	98.003
Non-Governmental Organization Strengthening (NGO)	98.004
Institutional Capacity Building (ICB)	98.005
Foreign Assistance to American Schools and Hospitals Abroad (ASHA)	98.006
Food for Peace Development Assistance Program (DAP)	98.007
Food for Peace Emergency Program (EP)	98.008
John Ogonowski Farmer-to-Farmer Program	98.009
Denton Program	98.010
Global Development Alliance	98.011
USAID Development Partnerships for University Cooperation and Development	98.012



## B. Product Service Codes Table

- **PRODUCT SERVICE CODES:** Report the four-character code that identifies the research and development, services, or supplies and equipment. If more than one code applies, report the code that represents the predominance of the dollars obligated or de-obligated for the contract/action. (see attached listing of generally used numbers). A look-up field is also available:
  - **For research and development** – These codes begin with the letter “A”.
  - **For services other than research and development** – These codes begin with any other letter other than “A”.
  - **For supplies and equipment** – Use the numeric codes
  - **For construction** – These codes begin with “Y” or “Z”

AB90	R&D-OTHER SVC & DEVELOP		R499	OTHR PROFESSIONAL SVCS	
B599	OTHER SPECIAL STUDY & ANALYSES		R506	STUDY/DATA - OTHER THAN SCIENTIFIC	
C111	BLDGS & FAC / ADMIN & SVC BLDGS		R599	OTHER SPECIAL STUDY & ANALYSES	
C118	BLDGS & FAC / R&D FACILITIES		R610	PERSONAL PROPERTY MANAGEMENT SVCS	
C119	BLDGS & FAC / OTHER BUILDINGS		R699	OTHER ADMINISTRATIVE SUPPORT SVCS	
D301	ADP FACILITY MANAGEMENT		R701	MGT SVCS/ADVERTISING	
D302	ADP SYSTEMS DEVELOP		R702	MGT SVCS/DATA COLLECTION	
D303	ADP SVCS/DATA ENTRY		R703	ACCOUNTING SERVICES	
D304	ADP SVCS/TELECOMM & TRANSMISSION		R704	MGT SVCS/AUDITING SERVICES	
D305	ADP TELEPROCESSING & TIMESHARE		R706	MGT SVCS/LOGISTICS SUPPORT	
D306	ADP SYSTEM ANALYSIS		R707	MGT SVCS/CONTRACT & PROCUREMENT SUP	
D307	AUTOMATED INFORMATION SYSTEM SVCS		R710	FINANCIAL SERVICES	
D308	ADP PROGRAMMING SVCS		S206	GUARD SVCS	
D309	ADP INF, BROADCAST & DIST SVCS		U099	OTHER ED & TRNG SVCS	
D310	ADP BACKUP & SECURITY SVCS		V002	MOTOR POOL OPERATIONS	
D311	ADP DATA CONVERSION SVCS		Y111	CONSTRUCT/OFFICE BUILDINGS	
D312	ADP OPTICAL SCANNING SVCS		Y199	CONSTRUCT/MISC BLDGS	
D313	COMPUTER AIDED DESGN/MFG SVCS				
D314	ADP ACQUISITION SUP SVCS				
D399	OTHER ADP & TELECOMMUNICATIONS SVCS. (INCL. DATA STORAGE)				
F999	OTHER ENVIR SVC/STUD/SUP				
H199	QUALITY CONT SV/MISC EQ				
H999	MISC TEST & INSPECT SVC				
L069	TECH REP SVCS/TRAINING AIDS-DEVICES				
L070	TECH REP SVCS/ADP EQ & SUPPLIES				
L075	TECH REP SVCS/OFFICE SUPPLIES				
L099	TECH REP SVCS /MISC EQ				
Q999	OTHER MEDICAL SVCS				
R119	BLDGS & FAC / OTHER BUILDINGS				
R219	OTHER ARCHITECTS & ENGIN GEN				
R301	ADP FACILITY MANAGEMENT				
R305	ADP TELEPROCESSING SVCS				
R306	ADP SYSTEM ANALYSIS				
R307	AUTOMATED INFORMATION SYSTEM SVCS				
R399	OTHER ADP SVCS				
R401	PERSONAL CARE SERVICES				
R419	PROF SVCS/EDUCATIONAL SERVICES				
R421	PROF SVCS/TECHNICAL ASSISTANCE				
R497	PERSONAL SERVICES CONTRACTS				
R498	PATENT AND TRADEMARK SERVICES				

### C. NAICS Codes Table

- **North American Industry Classification System (NAICS)** Report the 6-digit code that best identifies the product or service acquired and represents the predominance of the dollars obligated or deobligated for the contract/action. The Product or Service Code (PSC) must correlate to the selected NAICS. (see attached listing of generally used numbers). The ‘Look-up’ is available for this field. Construction codes beginning with “23”.

<b><u>MOST FREQUENTLY USED NAICS CODES</u></b>	
<b>DESCRIPTION</b>	<b>NAIC</b>
1. Administrative management & general management consulting service	541611
2. All other business support services	561499
3. All other information services	514199
4. All other personal services	812990
5. All other professional & technical services	541990
6. All other support services	561990
7. All other travel arrangement & reservation services	561599
8. Architectural services	541310
9. Commodity contracts dealing	523130
10. Computer & office machine repair & maintenance	811212
11. Computer management facilities	541513
12. Computer systems design services	541512
13. Computer training	611420
14. Couriers	492110
15. Custom computer programming services	541511
16. Data processing services	514210
17. Document preparation services	561410
18. Educational support services	611710
19. Emergency & other relief services	624230
20. Engineering services	541330
21. Environmental consulting services	541620
22. Facilities support services	561210
23. Fitness & recreational sports centers	713940
24. Foodservice contractors	722310
25. Freight transportation arrangement	488510
26. General warehousing & storage	493110
27. Graphic design services	541430
28. Highway & street construction	234110
29. Janitorial services	561720
30. Language schools	611630
31. Motor vehicle supplies & new parts whsle	421120
32. Multifamily housing construction	233220
33. New car dealers	441110
34. Office administrative services	561110
35. On-line information services	541519
37. Other management consulting services	541618
38. Other scientific & technical consulting services	541690
39. Other telecommunications	513390
40. Remediation services	562910
41. Satellite telecommunications	513340
42. Security guards & patrol services	233210
44. Temporary help services	561230

